

Delaware Emergency Management Agency
Terrorism Preparedness Section
SOP Checklist: Contracts Process

Step	Action	Who	Comp
1	Determine what the contract is going to be named, what your two advertising dates will be and when your bid opening is going to be.		
2	Email Stephanie Young (cc: to Tony, Bob and the planner) with the information in #1 and ask her if the bid opening date is available.		
3	Stephanie will email you back with a meeting request, which will contain the following information you need for your boilerplate and advertisements: Location Date of opening Time of opening Contract number		
4	Open either the ITB or RFP Data Source (an Access Database) and enter in the information for your contract into the appropriate spaces. It is located on the J: drive at: J:\Grant Program\Contracts\Boilerplates and directions from Stephanie Young. If you do not see the data entry fields, you can make them appear by double clicking on the Office_Address_List: Table at the left of the screen.		
5	Open either the ITB or RFP boilerplate (depending on what kind of contract you are going to do). It is set up with merge fields to merge the data from the Data Source to your document.		
6	If you do not see the information you entered into the Data Source, you will need to click on the Mailings tab at the top of your screen.		
7	Then click on Preview Results to get it to merge the information from the database into the template. You may have to use the arrows at the top of the screen in the Preview Results section to move it through to the information for your contract.		
8	You will need to go through the contract and make sure everything merged correctly and also to choose the appropriate choice in the yellow highlighted sections.		
9	Save the document in a new folder with the following format: contract number title (Ex. 09-0130-07 Newark Mobile Command Vehicle). Be sure to save it as the 97-2003 version of Word because most end users have not upgraded yet and won't be able to read it if you don't.		
10	Send the boilerplate to your end user for review and approval, along with the advertisement dates and bid opening date.		
11	When you get their approval back, you need to send the completed boilerplate to Stephanie Young (copy to Bob, Tony and the planner) so she can submit it to State Contracting for approval. This step can take up to three weeks so be sure to add in enough time for your bid opening to accommodate this and the advertising.		
12	Once you get approval back from State Contracting, you are ready to work on the advertising documents.		

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13	Open the ITB or RFP Advertisement document in either the ITB or RFP folders.		
14	It is set up with merge fields to merge the data from the Data Source to your document.		
15	If you do not see the information you entered into the Data Source, you will need to click on the Mailings tab at the top of your screen.		
16	Then click on Preview Results to get it to merge the information from the database into the template. You may have to use the arrows at the top of the screen in the Preview Results section to move it through to the information for your contract.		
17	You will need to go through the advertisement and make sure everything merged correctly and also to choose the appropriate choice in the yellow highlighted sections.		
18	You will see that the current date has to be updated and you will want to read through it to ensure that everything listed is correct and that the merge worked correctly.		
19	Save the document with the following format: Advertisement Request Title Contract Number Name of Newspaper (Ex. Advertisement Request Newark Mobile Command Vehicle 09-0130-07 News Journal). Be sure to save it as the 97-2003 version of Word because most end users have not upgraded yet and won't be able to read it if you don't.		
20	The next step is to email them to jlevy@newszap.com (Janet Levy) for the News Journal (copy to the planner and Cindy Carney) and ksegner@delawareonline.com (Kristin Segner) for the DE State News (copy to the planner and Cindy Carney).		
21	They will email you back a proof for your approval, which you should send back to them and copy to the planner and Cindy Carney.		
22	At this point you will have your pricing information for the advertising costs so you can complete your DHS requests for the advertising.		
23	Save the ITB/RFP document as a PDF by choosing Print/Cute PDF Writer—use the same naming format but leave out the name of the end user—we don't want the vendors to contact the end users instead of us with questions.		
24	Send the PDF file to the IT Section and ask them to post it to the DEMA website.		
25	Cut the ads out of the newspapers.		
26	Attend the bid opening.		
27	Forward the bid documents to the end user for their review and decision. Give them two weeks to review it.		
28	Prepare the award memo for Jamie's signature per the request from the end user.		
29	Stephanie will get the award memo from Jamie and will prepare the award documents—she needs at least 5 days to do this and the contract		

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	award has to be made within 30 days from the opening (that's why the end user gets 2 weeks—you get a week for the memo to circulate for signature and Stephanie gets a week for the award package to be signed by the Cabinet Secretary).		
30	When she receives the signed award documents back, she will forward them to you. Sometimes Cindy gets it but she will give it to you.		
31	Request a formal quote from the vendor so you can process the DHS—you can't submit a DHS with just the contract. You have to have a quote. You will also need to include a copy of the contract with the DHS request.		
32	Follow the normal DHS process.		

Note: all questions from vendors must be in writing and all answers must be shared with all vendors, the planner, Stephanie Young, Tony Lee and Bob Harrison. If they call you, ask them to email you with their questions so you can follow the above process. It may be helpful to create a Frequently Asked Question document to post with the contract on the website.

Also, State Contracting will post a copy of the contract on their website.